

**REQUEST FOR REFUND OR EXEMPTION**  
**OF CITY OF MOUNTAIN VIEW REAL PROPERTY TRANSFER TAX**  
**MOUNTAIN VIEW CITY CODE SECTION 29.62**

City of Mountain View  
Finance and Administrative Services Department  
P.O. Box 7540  
Mountain View, CA 94039-7540

**REAL PROPERTY CONVEYANCE TAX**

Grantor: \_\_\_\_\_

Relationship to Grantee: \_\_\_\_\_

Grantee: \_\_\_\_\_

Relationship to Grantor: \_\_\_\_\_

Property Address: \_\_\_\_\_

Assessor's Parcel Number: \_\_\_\_\_

The undersigned requests a refund of the real property transfer tax paid to the County Recorder of Santa Clara County or requests an exemption from the real property conveyance tax pursuant to Mountain View City Code Section 29.62 and following for the reasons stated below:

☐ **REFUND OF REAL PROPERTY TRANSFER TAX PAID:**

The following document(s) was/were recorded with County Recorder and the City's real property transfer tax was paid.

- a. Type of Document Recorded (copy attached):  
\_\_\_\_\_
- b. Doc. No. \_\_\_\_\_ in Book \_\_\_\_\_ at Page No. \_\_\_\_\_
- c. Date of Recording: \_\_\_\_\_
- d. Amount of Tax Paid: \$ \_\_\_\_\_ (attach receipt)

—OR—

☐ **EXEMPTION OF REAL PROPERTY CONVEYANCE TAX FOR PROPOSED TRANSFER:**

Document(s) not yet recorded with County Recorder and no tax paid yet.  
Applicant wants prior determination of exemption.

**BASIS FOR CLAIM OF REFUND OR EXEMPTION**

- ☐ Transfer of property between immediate family members (grandparent; parent; child; spouse).
- ☐ Transfer of property pursuant to property settlement in dissolution of marriage pursuant to Revenue and Taxation Code Section 11927.
- ☐ Transfer of property for purpose of adding or deleting a cosigner with no financial consideration.
- ☐ Transfer of real property by deed, etc. conveying lands by inter vivos trust or by reason of death pursuant to Revenue and Taxation Code Section 11930.
- ☐ Transfer of title to property to accommodate change in names of partnership members where partnership continues to hold title to property pursuant to Mountain View City Code Section 29.71.
- ☐ Partnership per Mountain View City Code Section 29.71.
- ☐ Transfer of property title to accommodate a change in office of the trustee. No change in ownership and no financial consideration.
- ☐ Other (29.66, 29.67, 29.68, 29.69, 29.70)

**STATEMENT OF FACTS**

I/We declare that I/we qualify for a refund or exemption of the City of Mountain View real property conveyance tax for the following reasons:

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I declare under penalty of perjury that the foregoing information and statement of facts are true and correct and request a refund or exemption of the real property conveyance tax.

Executed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, at  
\_\_\_\_\_, California.

\_\_\_\_\_  
(Printed Name of Claimant)

\_\_\_\_\_  
(Printed Name of Claimant)

\_\_\_\_\_  
(Signature of Claimant)

\_\_\_\_\_  
(Signature of Claimant)

\_\_\_\_\_  
(Title of Claimant)

\_\_\_\_\_  
(Title of Claimant)

CITY OF MOUNTAIN VIEW

☐ Approved

☐ Denied

By: \_\_\_\_\_  
Finance and Administrative Services Director

Dated: \_\_\_\_\_

Please include the following documents with this request:

- Copy of last recorded deed
- Copy of any applicable sections of a trust document that establish the key facts

Additional documentation may be requested, as necessary.

FI-49^ (10/08)